Pre-Exercise: Logging Into Core – CT

Purpose

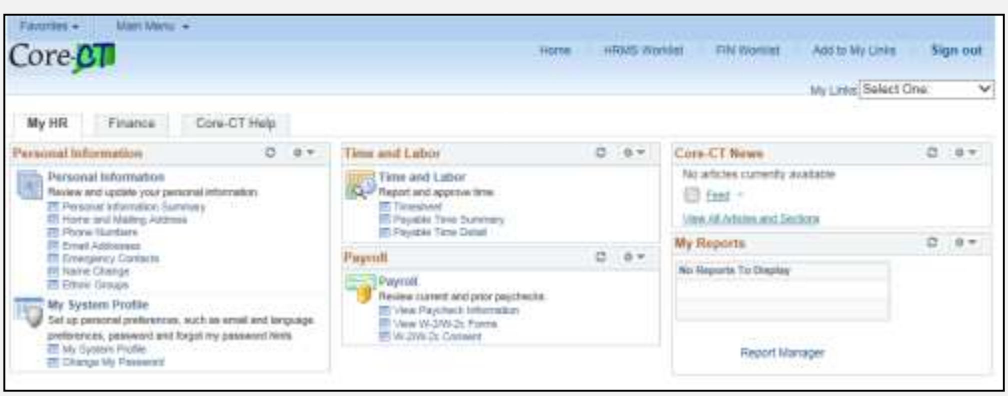
This exercise describes the steps for logging into Core – CT. The following are step-by-step instructions that will guide you through this activity.

Procedure

Step 1: Log into the PE93TRN environment using with your **User ID** and the **Password** provided to you.

Click **Sign In**.

The **Portal** page is displayed.



You have successfully completed the steps to logging Into Core-CT.

Exercise 1: Submit a P-Card Request

Purpose

This exercise describes the steps to submit a P-Card request. The following are step-by-step instructions that will guide you through this activity.

Procedure

Step 1: From the Portal page, navigate to ***Main Menu > Core-CT Financials > Purchasing > Procurement Card > Add/Update Procurement Card.***

The **Add/Update Procurement Card** page displays.

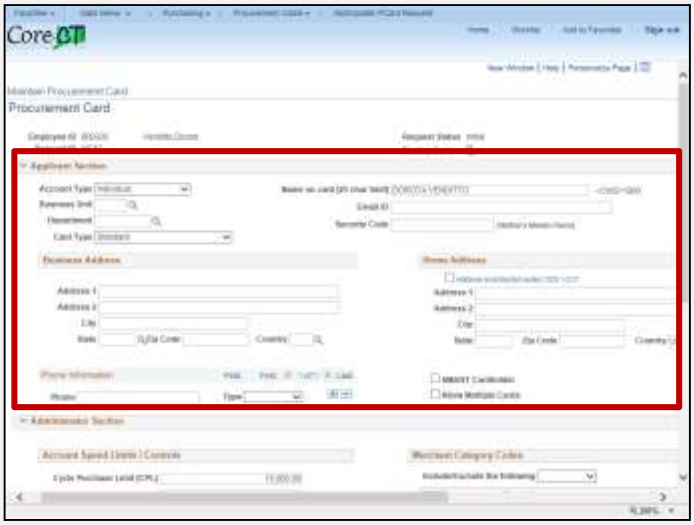
On the **Add a New Value** tab:

Enter the Employee ID in the **Empl ID** field (use the magnifying glass to search).

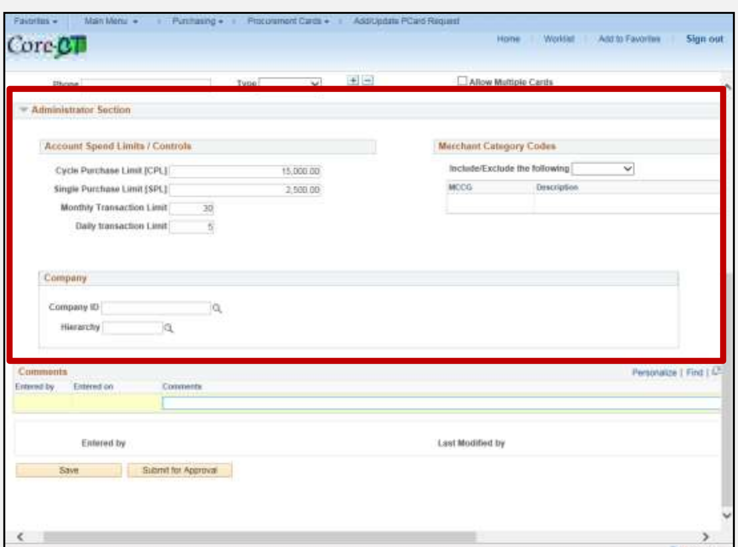
Click the **Add** button.

Procedure

Step 2: Fill in the applicable fields in the **Application** section:

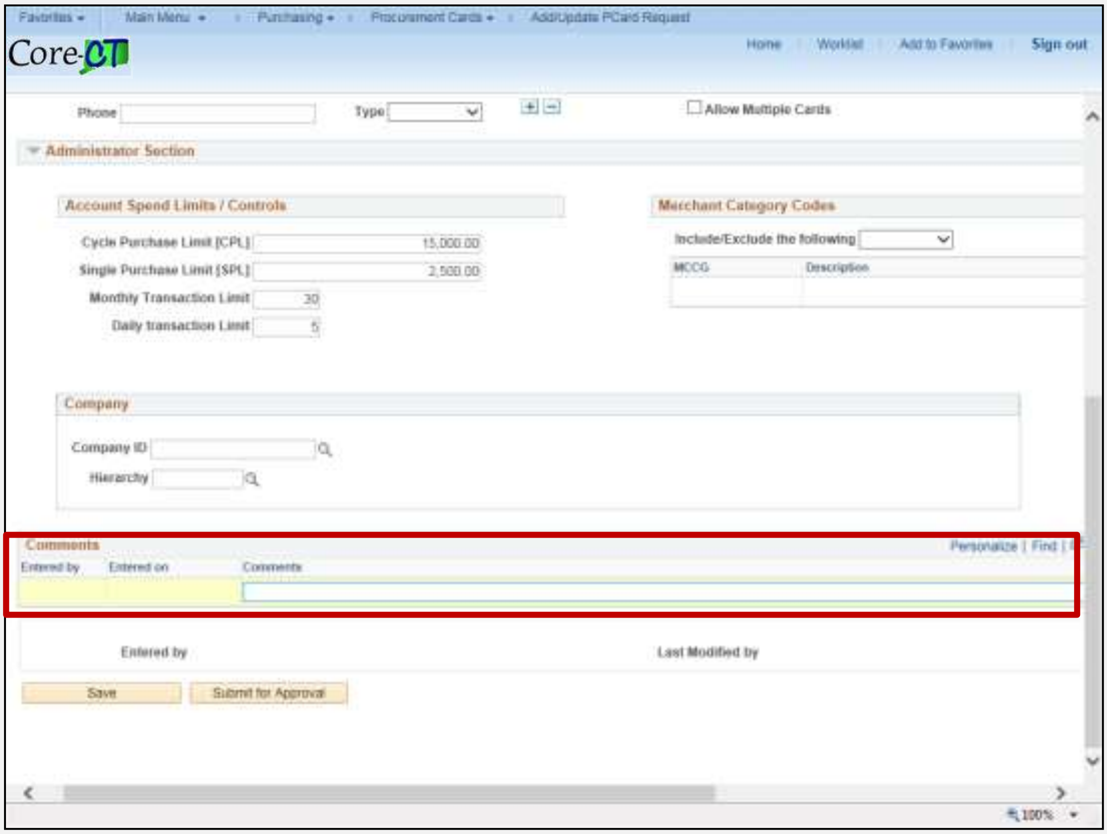


Step 3: Fill in the applicable fields in the **Administrator** section:



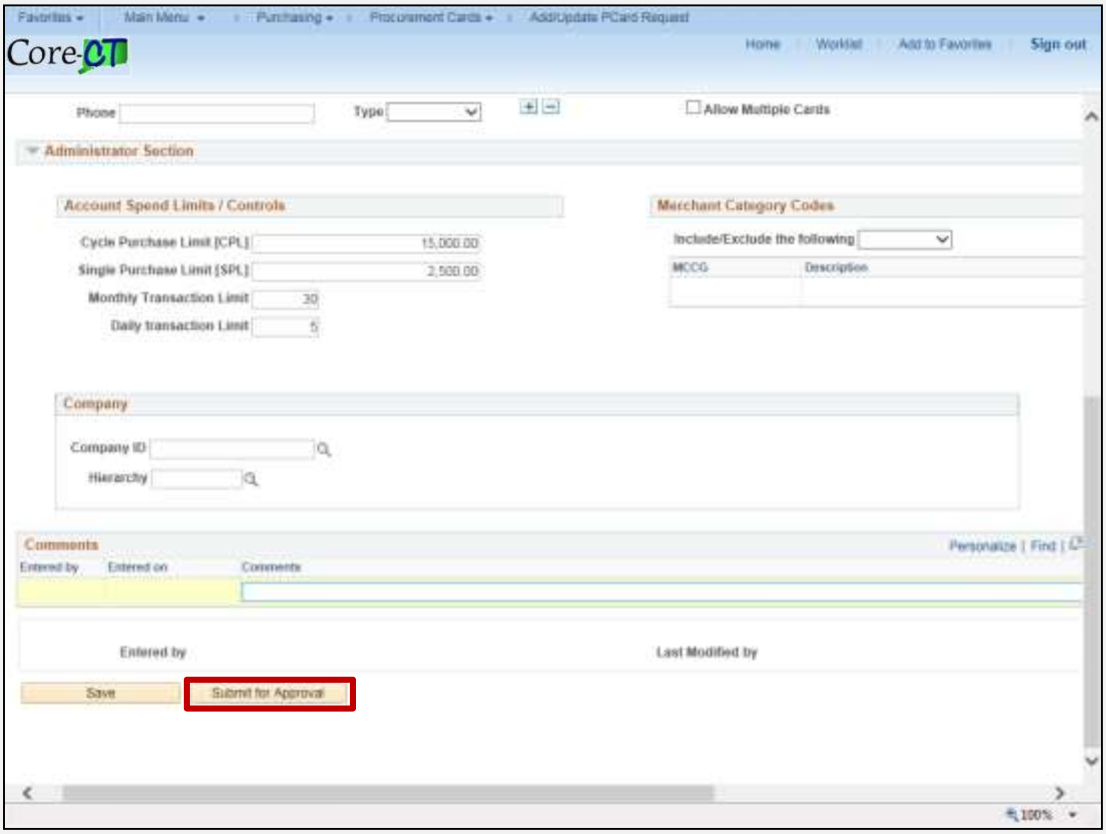
Procedure

Step 4: Enter a comment in the **Comments** field.



Procedure

Step 5: Click the **Submit for Approval** button.



You have successfully completed the steps to submit a P-Card request.

Exercise 2: Update the Cardholder Profile

Purpose

This exercise describes the steps to update the cardholder profile. The following are step-by-step instructions that will guide you through this activity.

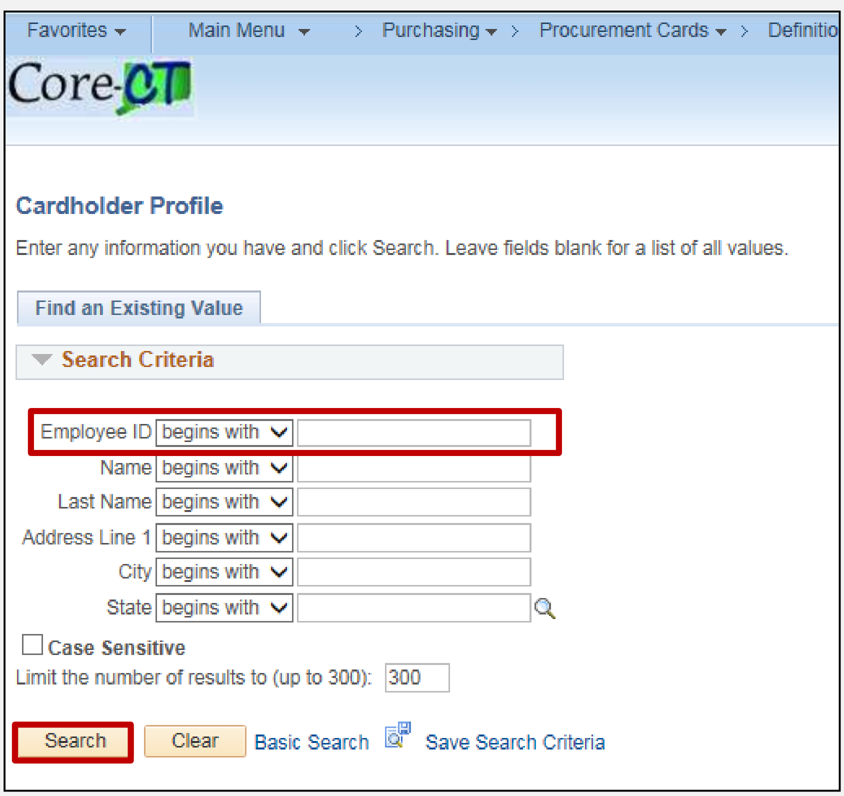
Procedure

Step 1: From the Portal page, navigate to ***Main Menu > Core-CT Financials > Purchasing > Procurement Card > Definitions > Cardholder Profile.***

The **Cardholder Profile** page is displayed.

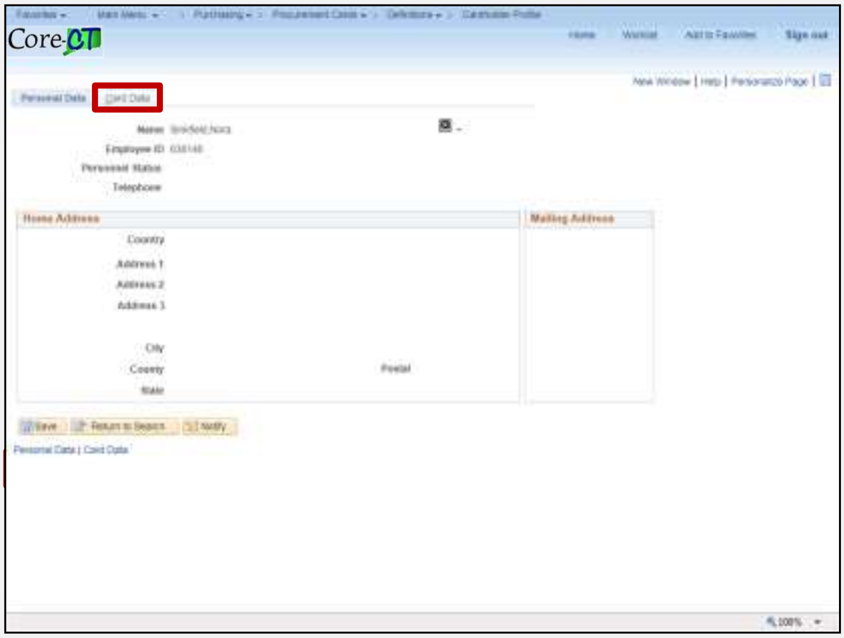
Enter **Your ID** in the **Employee ID** field.

Click the **Search** button.

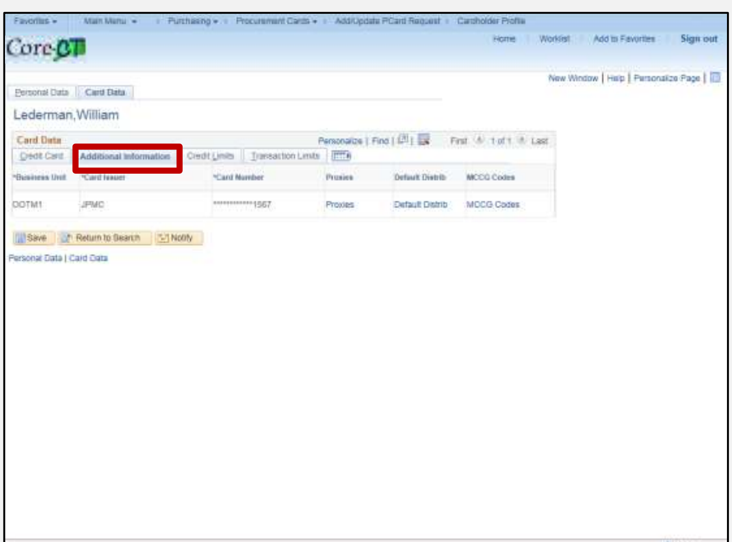


Procedure

Step 2: Click the **Card Data** tab.

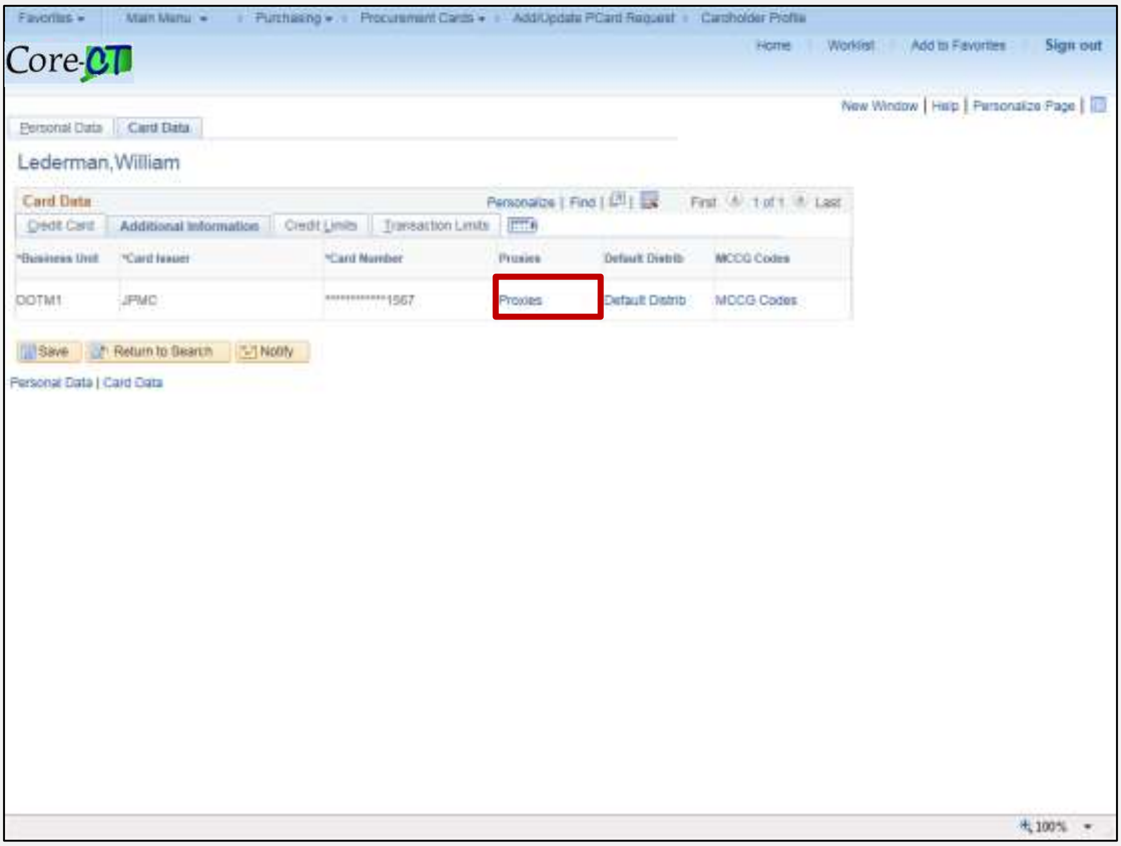


Step 3: Click the **Additional Information** link,



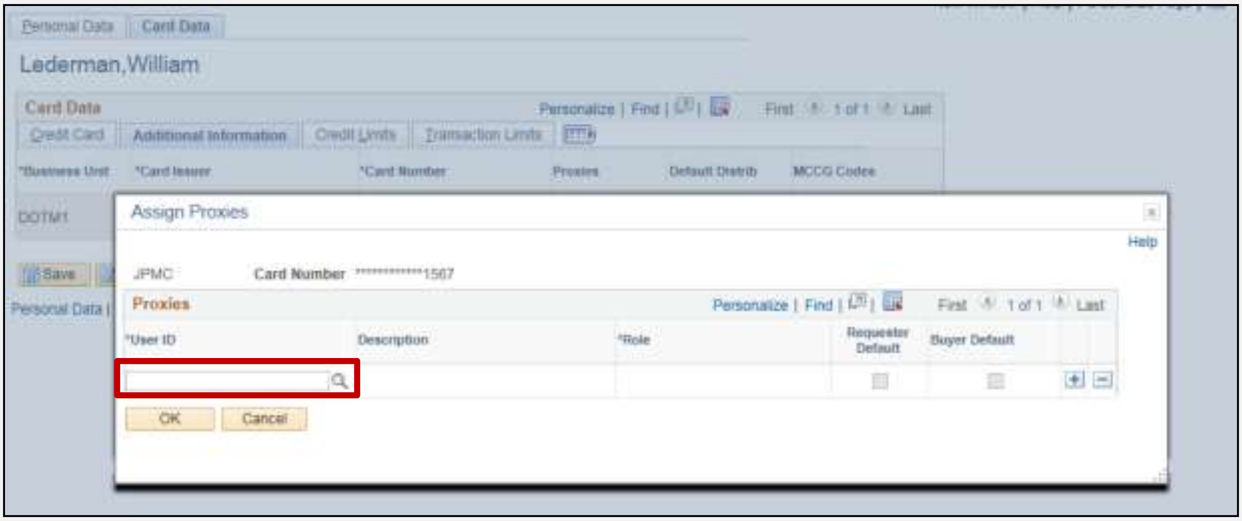
Procedure

Step 4: Click the **Proxies** link.



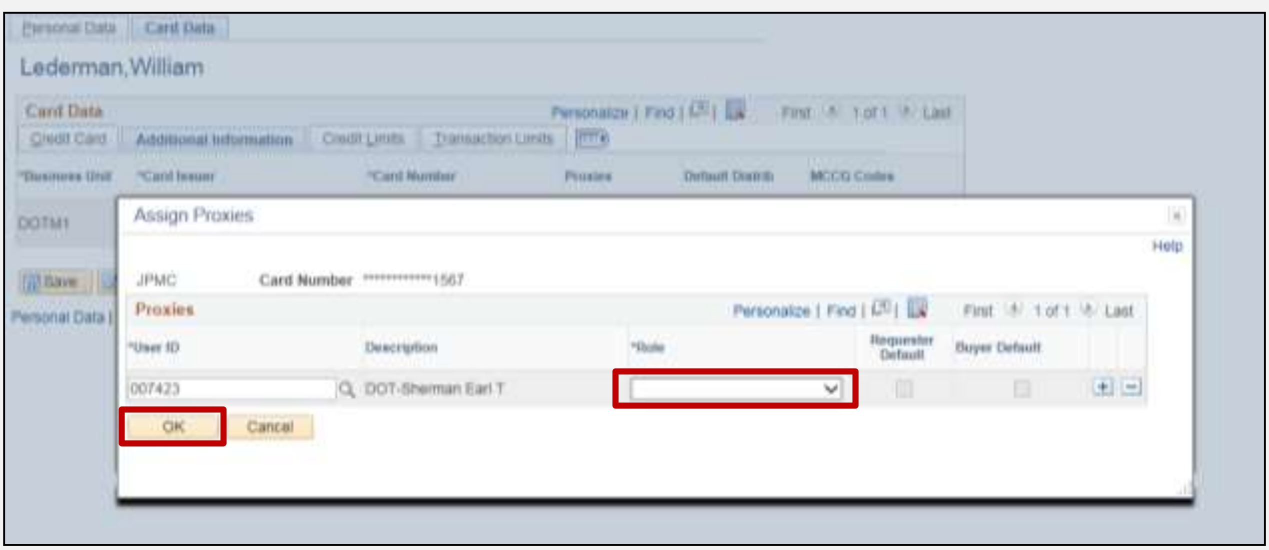
Procedure

Step 5: Enter (or search for) a **User ID** in the User ID field.



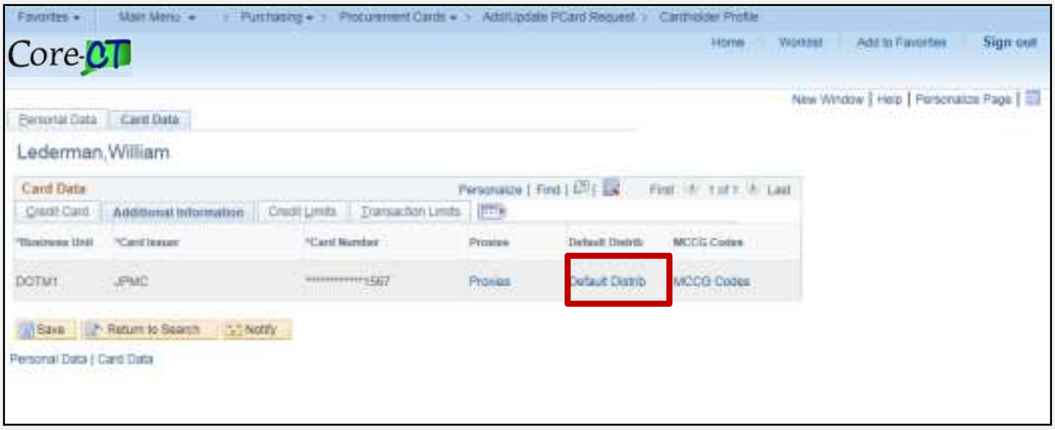
Step 6: Choose a role from the **Role** dropdown.

Click the **OK** button.



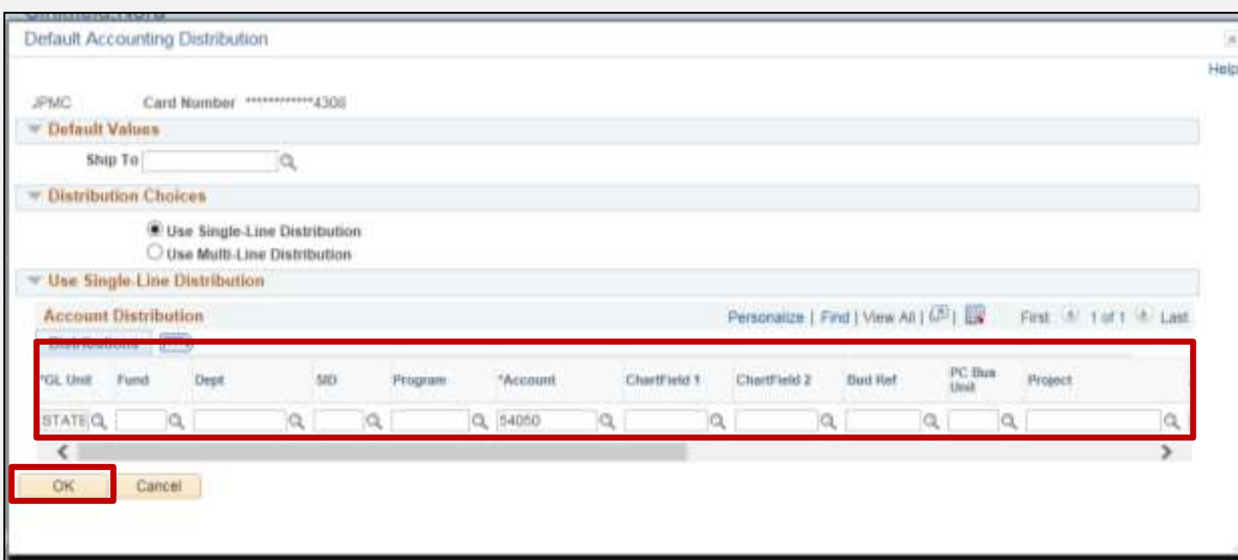
Procedure

Step 7: Click the **Default Distrib** link.



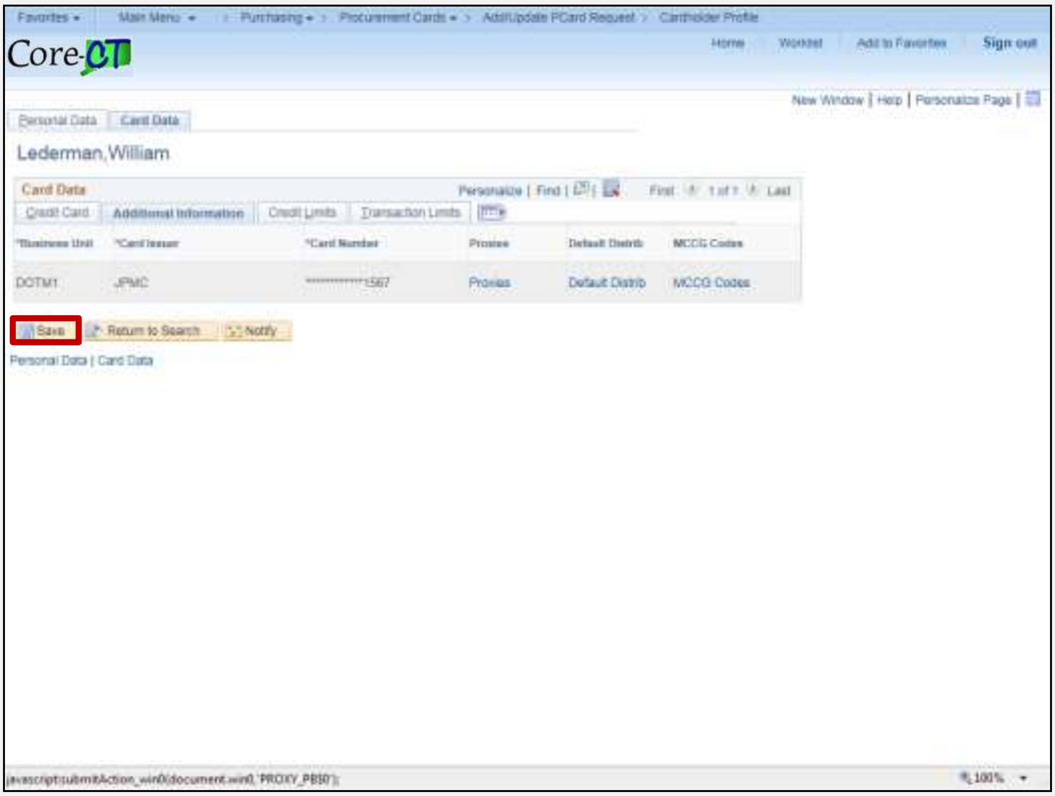
Step 8: Enter the appropriate Chartfield information.

Click **OK**.



Procedure

Step 9: Click the **Save** button.



You have successfully completed the steps to updating the Cardholder profile.